# Screener Training 101

MCI

Master Customer Index

Screener Training 101

- Basics
- Security/Screen Transfers
- Archiving
- MCI – Master Customer Index
- Auto Transfer to CARES
- Help

MCI
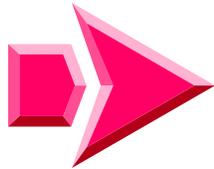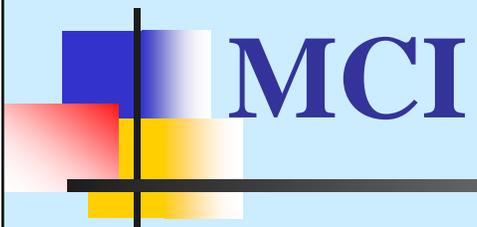
Master Customer Index

What is MCI?

- MCI stands for the Master Customer Index. The index is a way to identify the same person between different computer systems. Currently, there are two systems using MCI: CARES and LTC Functional Screens.
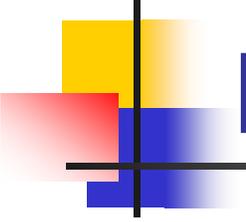
The MCI index contains four pieces of information

- A person's first name, middle initial, and last name
- A person's Social Security Number
- A person's date of birth
- A person's gender
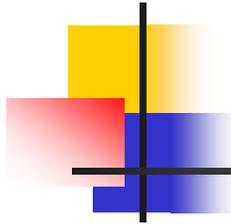
MCI Clearance

What is MCI Clearance?

MCI Clearance

- "Clearance" is a process of checking on identifying data for an individual (i.e. SSN, name, birth date, and gender) to make sure your individual does not already exist in the system. In the functional screen there are two levels of clearance.
  - LTC Clearance
  - MCI Clearance
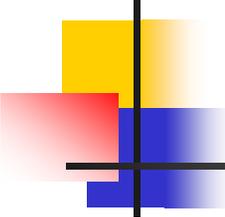
LTC Clearance

- When creating a new applicant, the screen application searches through all previous functional screen applicants, looking for any applicants that have exactly the same Social Security Number. LTC does not allow creating an applicant in LTC if the Social Security Number is already assigned in LTC.

Example: new applicant

- Enter a new applicant

Functional Screen Results Page

This applicant's SSN already exists in LTC
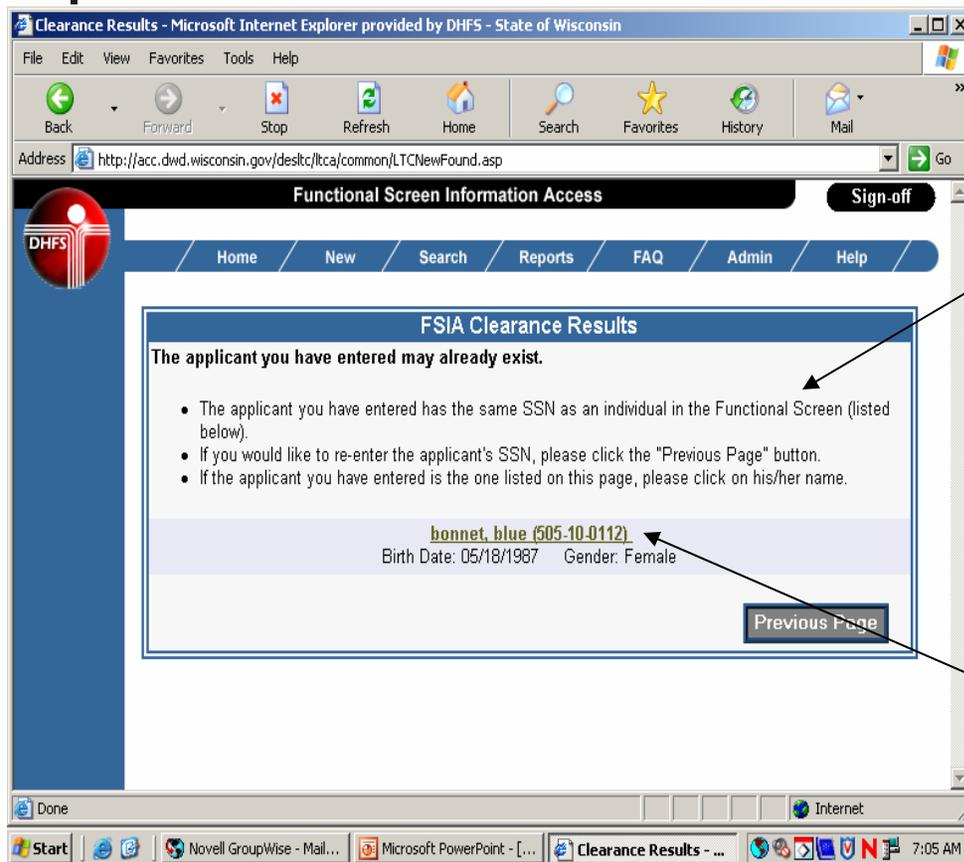
- This is the "Functional Screen" results page that is displayed when an SSN already exists in the LTC System.

- Link to an existing applicant
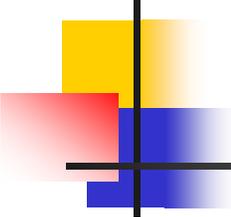
SSN Exists in LTC (cont)

- There are two choices

  1. If this is the person you are trying to enter, click on the name link. This will navigate you to the Applicant Screen Information page. At this point, you can work with the applicant and make any updates needed. For example, changing the name or birth date.
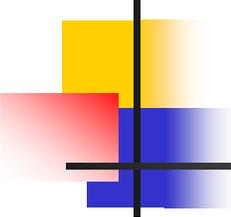
SSN Exists in LTC (cont)

2. If this person is not the person you are trying to enter, click on the Previous button. This will navigate you back to the New Applicant Screen where you can verify or change Social Security Number.
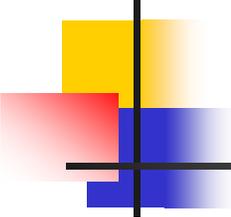
SSN Exists in LTC (cont)

- If the SSN already exists in LTC and it is not your person you will need to verify the SSN with the applicant. If the SSN is verified by the applicant then you will need to work with your lead screener to resolve the discrepancy between the SSN's.
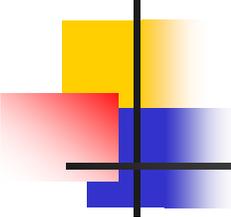
MCI Clearance

- When creating a new applicant, MCI looks through all the MCI records, looking to see if there are any individuals who have matching identifying data.
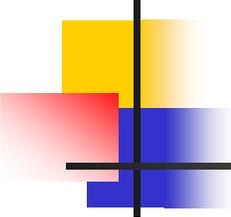
MCI Clearance (cont)

- MCI looks for an exact match on SSN or a "close" match (75%) on identifying data. There are two possible clearance screens that may be returned. One for an exact SSN match or one for a "close" match.

MCI Clearance Page for Exact SSN Match

SSN Exact Match on MCI

■ Differences in identifying data will be in Red.

■ Click on Select to choose an existing applicant
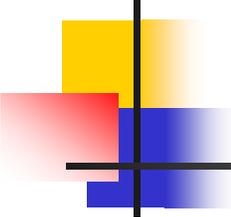
SSN Exact Match on MCI (cont)

- In this case the SSN matches exactly but, demographics such as name, birth date, and gender may be different.
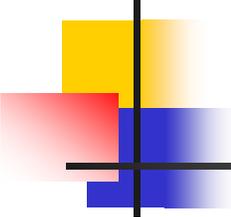
SSN Exact Match on MCI (cont)

- There are two choices

  1. If this is the person you are trying to enter, click on Select. A confirmation screen will be displayed. Press the confirm button and this will navigate you to the Applicant Screen Information page. At this point, you can work with the applicant and make any updates needed. For example, changing the name or birth date. This will also change the data in MCI.

SSN Exact Match on MCI (cont)

2. If this person is not the person you are trying to enter, click on the Previous button. This will navigate you back to the New Applicant Screen where you can enter a different Social Security Number.

Confirmation Screen

Confirmation Screen (cont)

- After clicking on a Select link a confirmation page is displayed. The screener must either click the Confirm button or click on the Previous Page button.

MCI Results Page for a "Close" Match

SSN "Close" Match on MCI

- **Identifying data may be different and will be in Red**

- **Click on Select to choose an existing applicant**

- **Select Create a new individual**

- **Use caution when selecting or creating a new individual.**
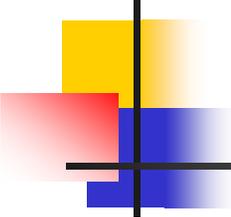
SSN "Close" Match on MCI (cont)

- There are three choices

1. If this is the person you are trying to enter, click on Select by the name. A confirmation screen will be displayed. Click the confirm button and this will navigate you to the Applicant Screen Information page. At this point, you can work with the applicant and make any updates needed.
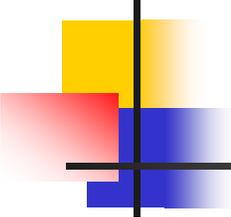
SSN "Close" Match on MCI (cont)

2. If this person is not the person you are trying to enter, and you want to proceed click on the Select link to create a new applicant. The confirmation page will be displayed. Click on the confirm button and this will create a new applicant and navigate you to the Applicant Information page.
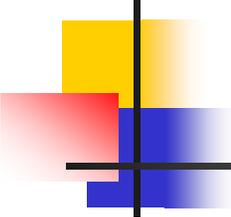
SSN "Close" Match on MCI (cont)

3. If this person is not the person you are trying to enter, and you do not want to create a new applicant, click on the Previous button. This will navigate you back to the New Applicant Screen where you can enter a different Social Security Number.

Confirmation Screen

Confirmation Screen (cont)

- After clicking on a Select link a confirmation page is displayed. The screener must either click the Confirm button or click on the Previous Page button.

MCI or LTC Matches

- The screener will need to evaluate the person on the clearance results pages and try to decide if that person is really the same as the functional screen applicant.
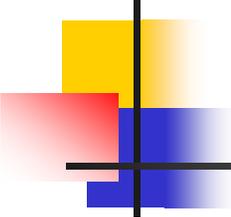
MCI or LTC Matches (cont)

- Examples:
  - The SSN's are the same but the name is different because of a name change
  - Name is misspelled or using nicknames
  - Two numbers are transposed in the SSN
  - Numbers are transposed in the Birth date
  - Birth date is off by a few days
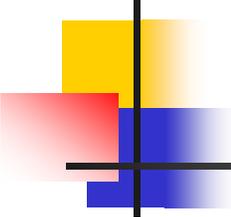
MCI or LTC Matches (cont)

- In evaluating the clearance results page the screener may need to:
  - consult with their lead screener if there is a question in the Functional Screen results
  - consult with their Economic Support (ES) Worker if there is a question between CARES and the Functional Screen results
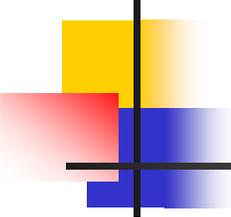
MCI Results on Update

- You may get results pages when updating SSN on an applicant

- Error pages may display when making changes to SSN on an existing applicant.

Example 1:
Updated SSN to an Existing SSN
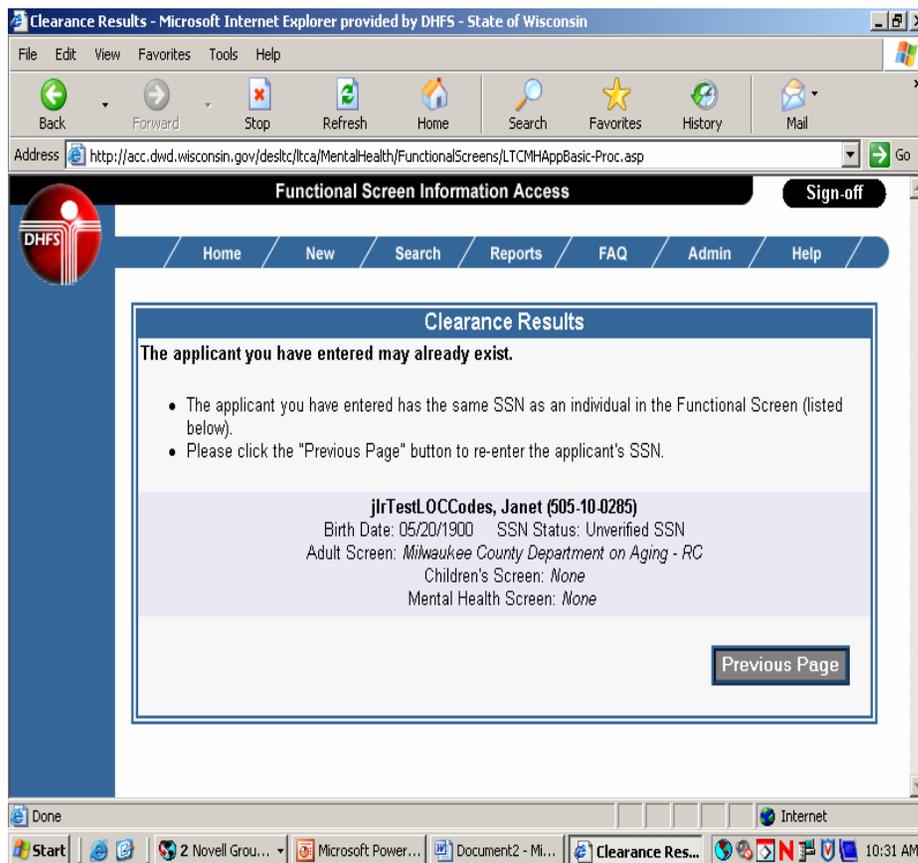
- In this example you may need to work within your agency to determine who has the correct SSN.

- Note, there is not a link on name in this case.

Example 2:
Updated an SSN and someone in MCI has the same SSN
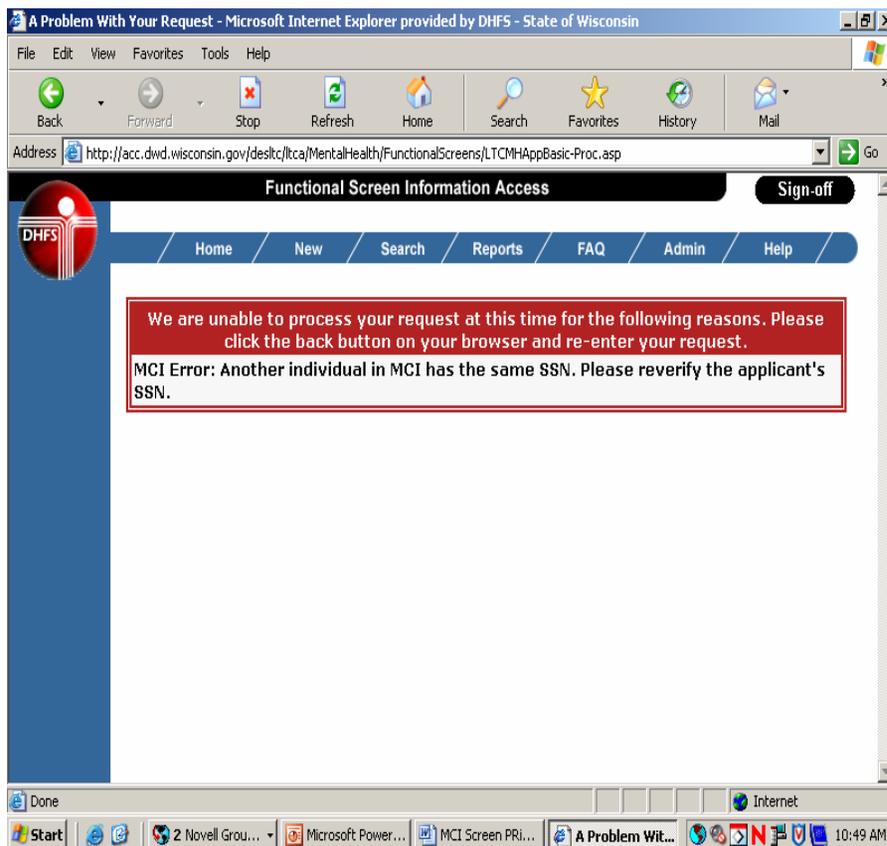
- you will not be able to proceed with the SSN you are trying to enter. If you determine this is the correct SSN, you will need to call the Help desk to get the error resolved.
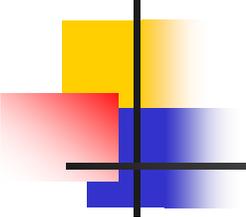
Tips

- In evaluating the LTC or MCI clearance results page
  - Determine if identifying data matches the applicant you are trying to enter. Use caution, if there are questions or any doubts call the Help Desk.
 - Consult with your lead screener if there is a question in the Functional Screen results where an SSN is existing in LTC
  - Consult with your Economic Support (ES) Worker if there is a question between CARES and the Functional Screen results

MCI
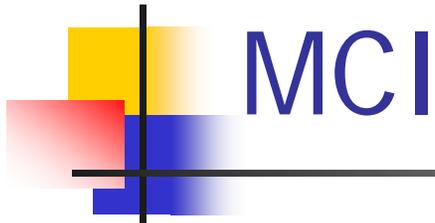
- Contacts
  - SOS Help Desk
  - Hours: 9:00 – 11:30 AM
            12:30 - 2:30 PM
            (you may leave voice mail at other times
            and someone will return your call)

    - E-mail: soshelp@dhfs.state.wi.us
    - Phone: (608) 266-9198
    - Fax: (608) 267-2437

MCI

- Demo